



Get It Done

USER MANUAL

**An in-depth guide to getting
the most out of your business**

October 2012



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Creating an Account with SohoOS

Your SohoOS experience begins with opening an account. To do so, please go to the SohoOS homepage at <http://www.sohoos.com>. To sign up, you can manually enter your business name, email address, and a preferred password, or you can use your Facebook account. If you choose to create an account using Facebook, SohoOS will use your Facebook email and password for your login credentials and will auto-generate a business name for you. To learn how to change your business name, please see page 12. Please note that the email address you provide will also be used for password recovery, so make sure it is a valid address that you check often.

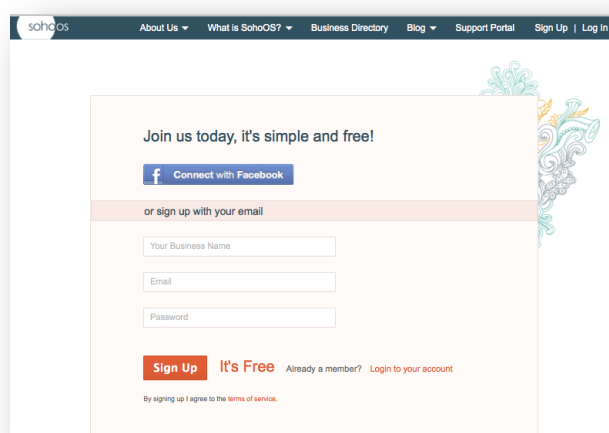


Image 1 – SohoOS sign-up

Once you have completed the sign up process, you will be taken to your SohoOS account's homepage, where you can begin to use SohoOS right away.

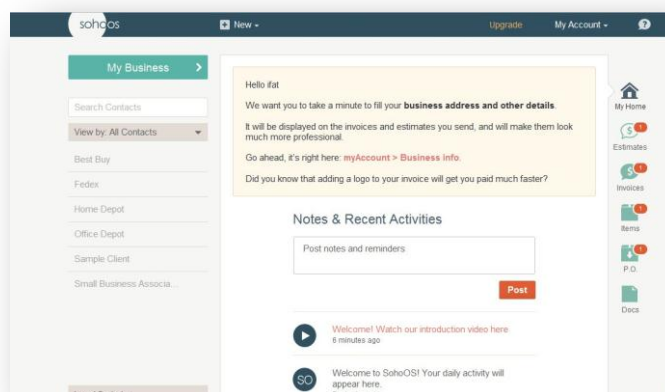


Image 2 – Homepage



Personalizing Your SohoOS Account

Click *My Account* (located on the top bar) and choose *Settings* from the dropdown menu to personalize your business information.

Sharing—Invite Friends

Do you know people who might be interested in SohoOS? Send invitations from the *Invite a Friend* tab. Enter your friends' email addresses (separate multiple email addresses with commas), add a personal message (optional), and click *Invite*.

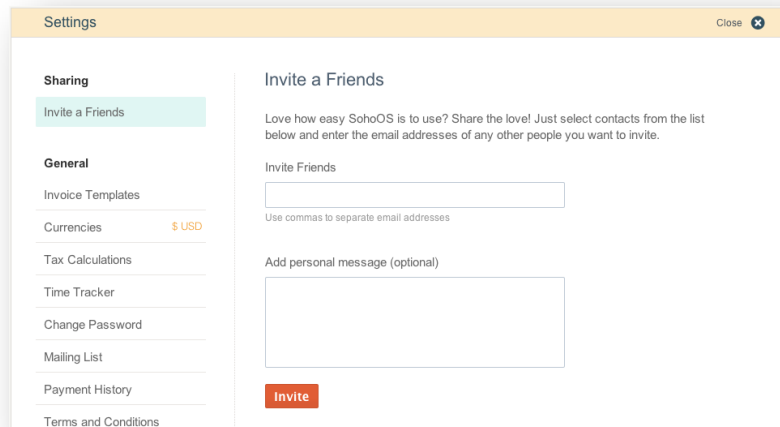


Image 3 – Invite Friends

General Settings

Your account settings can be changed at any time. Look under the *General* tab to find links to reset your password, see your payment history, edit your currency and taxes, change your terms and conditions, and more.



Invoice Templates

Get some attention! Your customers will sit up and take notice of the invoices you send with these invoice templates that we specially designed to make your business look good. Now you don't need any graphic design experience to create an eye-catching invoice—just choose one of our templates. Not sure which template you like best? Changing templates is so easy, you can try them all.

Under the *Invoice Templates* tab, you can choose from six different graphic designs such as *Purple Rain* or *Strawberry Delight*. In order to view a full-sized invoice design, select the desired template and create a new invoice.

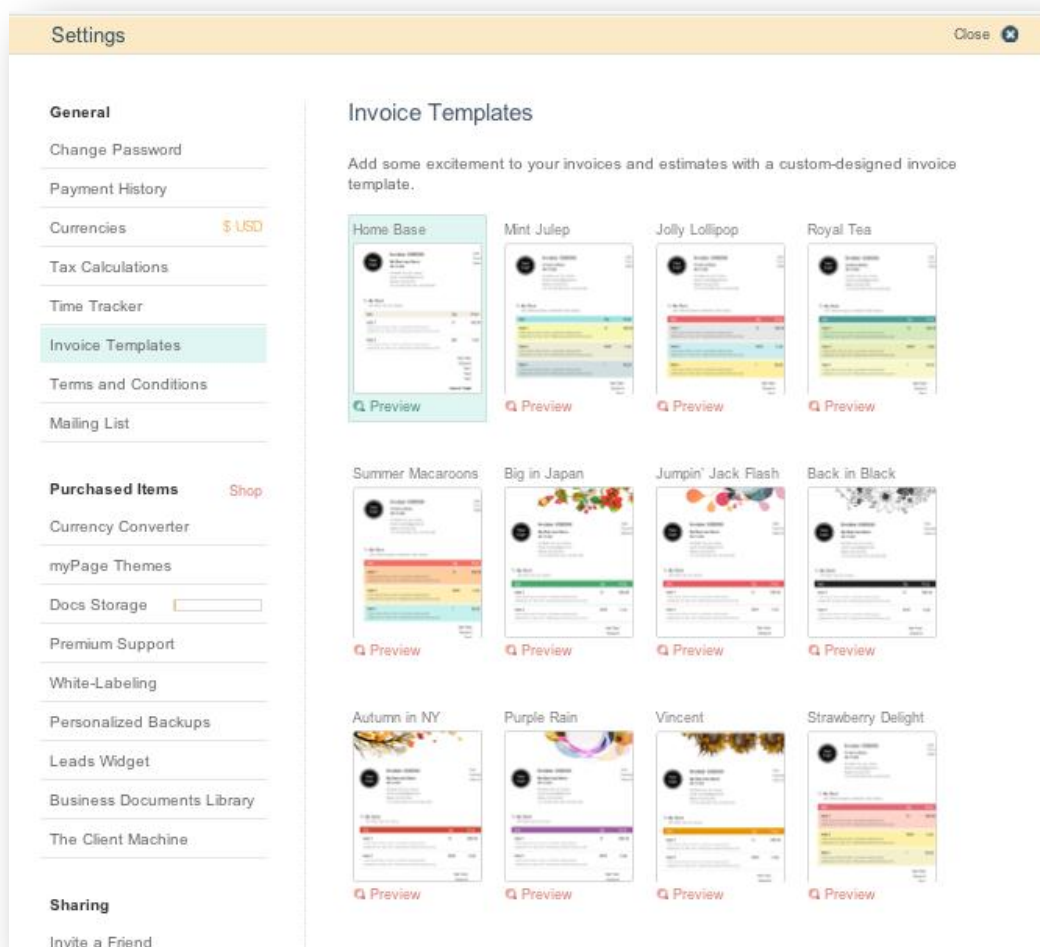


Image 4 – Choosing an invoice template



After you fill in the invoice details and click **Save** at the bottom, click the **PDF** button to view your completed invoice with the selected invoice template design.

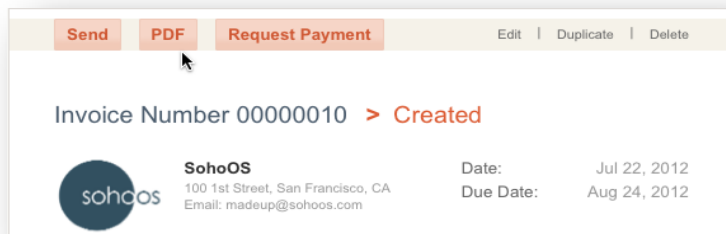


Image 5 – Making a PDF to view invoice design

Currencies

SohoOS uses US Dollars as the default currency. To change your default currency, click the **Currencies** tab. Choose your currency from the list and click **Save**.

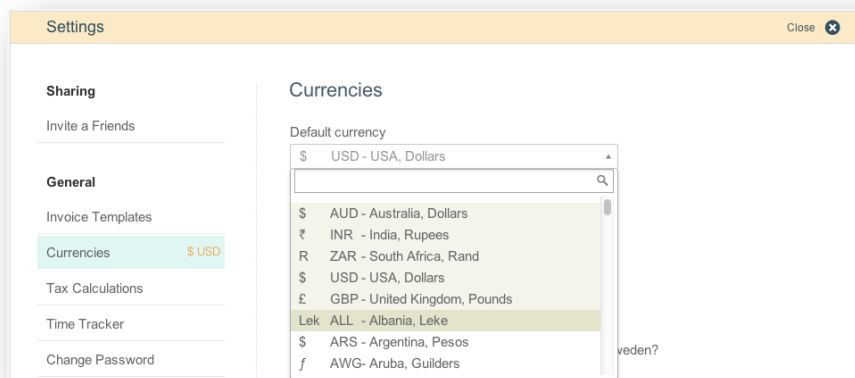


Image 6 – Currencies

If you perform international transactions, the Currency Converter will automatically set exchange rates for you. See page 36 for details.

Tax Calculations

You can set the correct tax rates for your business under the **Tax Calculations** tab. Click the **Edit** button to change names and rates of taxes. To activate or deactivate a tax, check or uncheck the box under **Active**.



Click Save and you are ready to go.

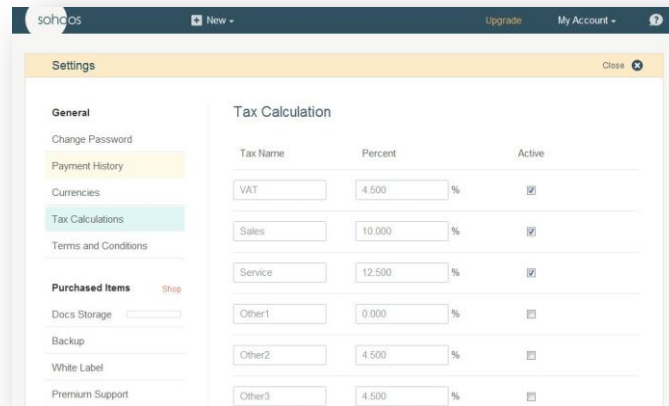


Image 7 – Changing Tax Calculation

Time Tracker

Time Tracker lets you keep track of all your billable hours and easily convert timesheets to invoices.

Under the *Time Tracker* tab in *Settings*, you'll see a dropdown menu that allows you to calculate your time in increments of 5, 6, 10, 15, 20, or 30 minutes, or 1 hour. Choose your preferred increment and click *Save*.

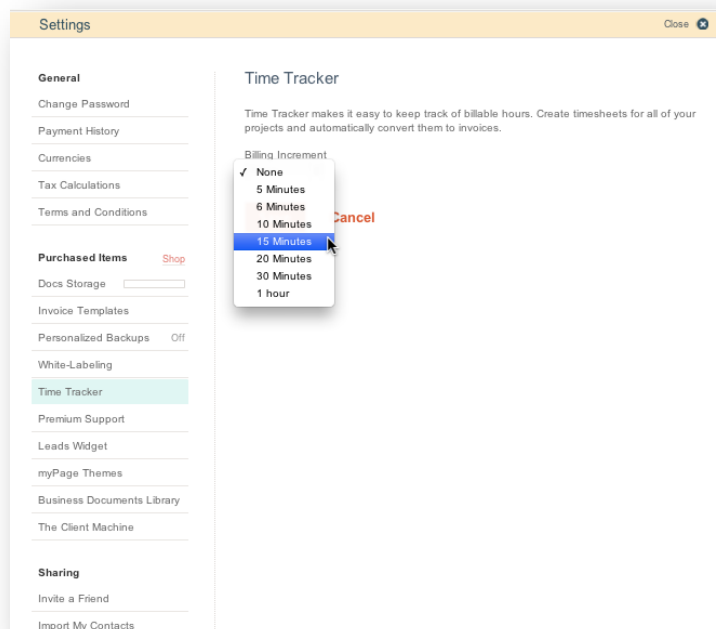


Image 8 – Setting time increment preferences



Note: Hours will be rounded according to the setting you choose. Rounding will not show up in Time Tracker entries; hours/billing calculations are only rounded when you attach time entries to an invoice.

For instructions on using Time Tracker to create invoices, please see page 29.

Change Your Password

To change your password, go to the *Change Password* tab. Enter your old password, then enter and confirm your new password and click *Save Changes*. If you forgot your password, click on the *Forgot password?* link and an email will be sent to the email address associated with your account. Click the link provided in the email and you will receive an additional email containing a temporary password to access your account. Follow the instructions provided previously to change your password.

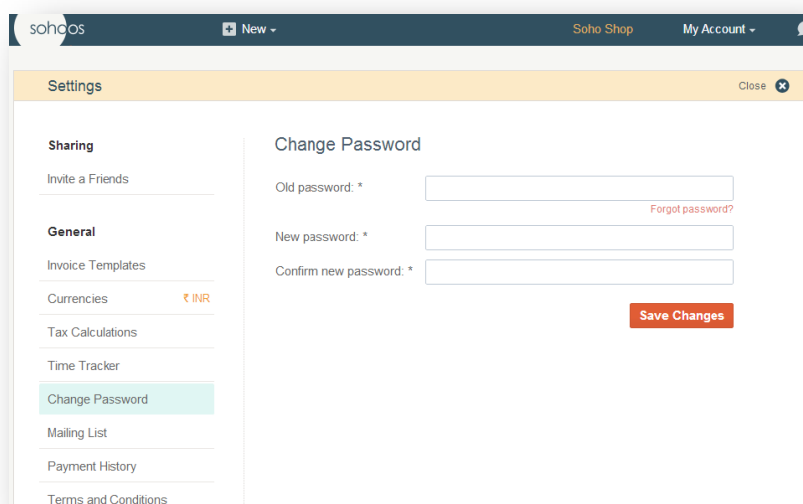


Image 9 – Changing your password

For information about changing your email address, please see page 13.

Mailing List

You can subscribe or unsubscribe from SohoOS mailing lists by checking or unchecking the relevant boxes on this page.



Payment History

Any time you purchase additional features from the Soho Shop, they will appear under the *Payment History* tab. To learn more about the Soho Shop, please see page 33.

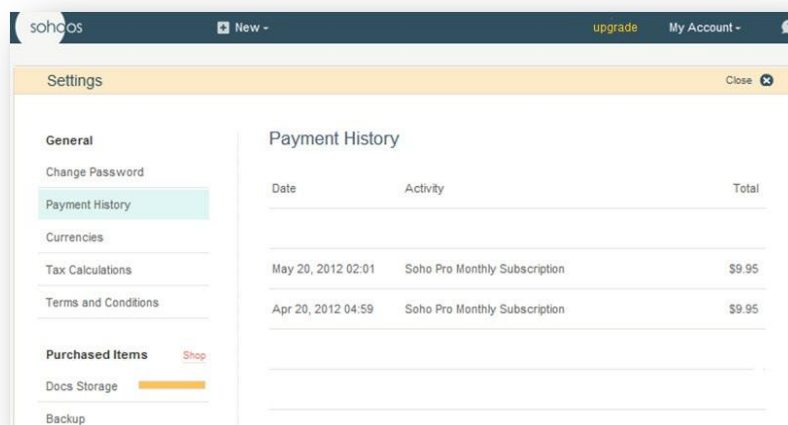


Image 10 – Payment History

Terms and Conditions

Terms and conditions will be attached as the footer on all the documents you send. Under the *Terms and Conditions* tab, you will see the default message we have entered on your behalf. Make sure you change it to fit your business needs by clicking the *Edit* button. Please note: This section is limited to 2,000 characters.

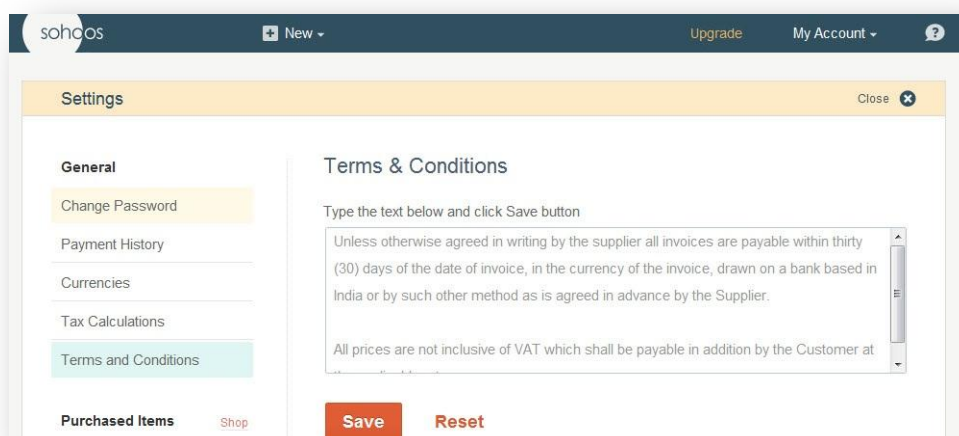


Image 11 – Changing Terms & Conditions



Purchased Items

This tab features a list of additional items that you can purchase to improve the way you do business. Click each item to learn more about it and find a direct link to the Soho Shop. Once you have purchased a feature, you can access it and edit your settings here.

Current items available for purchase include:

- Currency Converter
- myPage Themes
- Super-Sized Storage
- Premium Support
- White-Labeling
- Personalized Backups
- Leads Widget
- Business Document Library
- The Client Machine

More items are added to the Soho Shop all the time, so check back frequently. To learn more about these tools and how to use them, please see page 35.

Docs Storage

Click the *Docs Storage* icon to see how much space you have available, how many MB you have used, and how many folders you have used. You can purchase additional document storage space in the Soho Shop. See page 39 for more details.

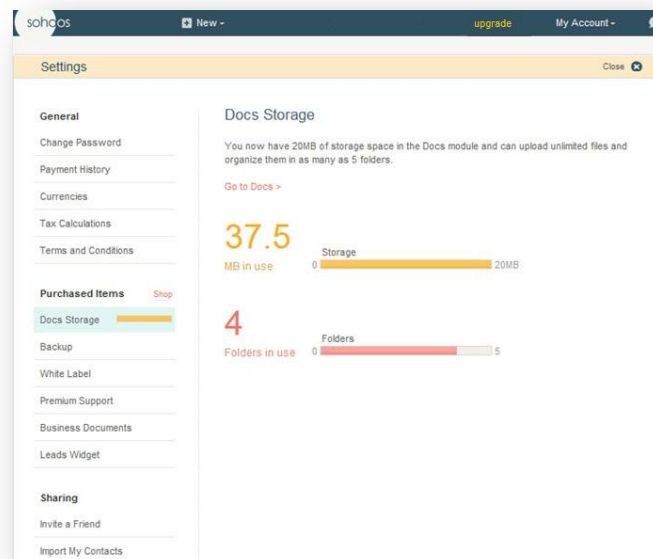


Image 12 – Docs Storage




Business Info

The *Business Info* page includes basic information about your business that will appear on every feature in the system, including your invoices, purchase orders, and estimates, as well as on your myPage. Go to *My Account* and click *Business Info* to view and edit your settings.

sohoos New Upgrade My Account

My Account > Business Info Close

This info will affect invoices, purchase orders, etc. and will not be published online without your agreement.

 Add Logo

File types: JPEG, GIF, PNG
Max. file size 1MB
You can drag & drop files on to the icon

Business Name *

ifati

Address *

Start typing

Email *

food@gmail.com [Change email](#)

VAT/Taxpayer ID [What is this?](#)

Telephone


Mobile

Fax

Save Cancel

Your business info placed at the top of your invoice.

Invoice 00000000

 Business Name
Address
Phone
Email

No Taxable Items

Qty	Unit	Price	Total
1	Unit	10.00	10.00
1	Unit	10.00	10.00
Sub Total			20.00
Tax			2.00
Shipping			5.00
Grand Total			27.00

[Preview My Invoice](#)

Image 13 – Business Info page

On the *Business Info* page, you can change your business name and email address, and you can add information such as your business address, Taxpayer ID, and your telephone, mobile, and fax numbers.

You can also upload or change your business logo from this screen. You can only upload files in JPEG, GIF and PNG formats and up to 1 MB in size.

Be sure to click *Save* when you are done. You can see how your invoices will look by clicking *Preview My Invoice*.



Change Your Email

To change your email address, click the link beneath your current email address that says *Change email*. You will be prompted to enter and confirm your new email address, as well as your current password. When you are done, click *Change Email*. All of your SohoOS business documents will reflect the change, and you will use the new email address to log in to your account.

sohoos New Upgrade My Account ?

My Account > Business Info Close

This info will affect invoices, purchase orders, etc. and will not be published online without your agreement.

Add Logo
File types: JPEG, GIF, PNG
Max file size 1MB
You can drag & drop files on to the icon

Business Name *
ifat

Address *
Start typing

Email *
support@sohoos.com
[Change email](#)

Your business info placed at the top of your invoice:

Invoice 00000001
Date: Apr 10, 2015
Payment Due: Apr 10, 2015
Amount: \$2778.00

Item	Qty	Price	Total
Service Fee	1	\$250.00	\$250.00
Service Fee	1	\$250.00	\$250.00
Sub Total			\$500.00
Shipping		\$10.00	\$10.00
Grand Total			\$778.00

[Preview My Invoice](#)

Change Email Address

The email address will be used for logging in, and will be displayed on your invoices and correspondence.

New email:
support@sohoos.com

Confirm email:
support@sohoos.com

Password:

[Change Email](#) [Cancel](#)

Image 14 – Changing your email address



myPage

myPage is a public listing on the SohoOS Business Directory. Click *myPage* under the *My Account* menu to add content and links to websites pertaining to your business that you want to display on your myPage.

Under *myPage*, you will see five tabs: Settings, Contact Info, Me on the Web, Description, and Portfolio.

Settings

On the *Settings* tab, you can decide whether or not you want to publish your myPage on the SohoOS Business Directory. By publishing your myPage, you are making it public, and it will be visible to anyone inside or outside of SohoOS. By default, your myPage is already published. To unpublish it, uncheck the box next to *Publish myPage*.

If you would like to set a custom URL for your myPage, you can edit it once your page is published. **Note:** *you can only change the URL once, so make it count*. When you are done, click *Save*.

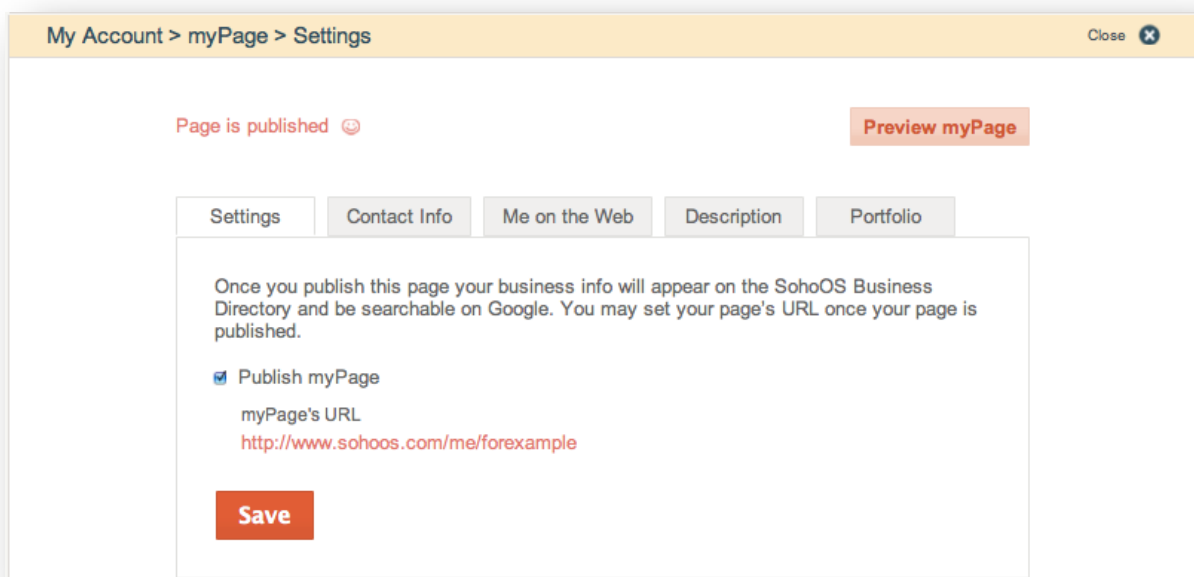


Image 15 – myPage—Settings



Contact Info

On the *Contact Info* tab, you can choose which contact information you want to display on your myPage. The contact information shown is taken directly from your Business Info. Uncheck *Show on Page* for whichever contact information you do not want to be shown. When you are done, click **Save**.

My Account > myPage > Contact Info Close

Page is published **Preview myPage**

Settings Contact Info Me on the Web Description Portfolio

Please enter the contact info for your business.

Contact Name *

SohoOS

Address: 100 1st St, San Francisco, CA 94105, USA Why show on page? ☒ Show on page

Phone # 888-555-5555 ☒ Show on page

Mobile # 877-878-7878 ☒ Show on page

Fax #

If you wish to change / add your contact information go to [My Account > Business Info](#)

Save

Image 16 – myPage—Contact Information



Me on the Web

On the *Me on the Web* tab, you can add links to all your online profiles, such as your business website, catalogs and portfolios, Facebook, Twitter, LinkedIn, Google+, and YouTube. Just copy the URL into the appropriate section and, when you are done, click **Save**.

My Account > myPage > Me on the Web Close

Page is published Preview myPage

Settings | Contact Info | **Me on the Web** | Description | Portfolio

Here you can add links to all your online profiles (Think we missed a few? [Let us know.](#))

If your business has a website please enter the URL, such as [www.yourwebsite.com](#)

Link to other websites your business has in different platforms online (if you have any)

[See more profiles ^](#)

Links To Websites

Please enter links to websites showcasing any of your business projects (catalogues, brochures, portfolios, etc.)

Add a website link

[+ Add more links to your portfolio](#)

Save

Image 17 – myPage—Me on the Web



Description

Write about your business and the things you do on the *Description* tab. You can change the title of your page, explain what you do in a nutshell, choose the industry you work in, and write a description of your business practices. When you are done, click **Save**.

Image 18 – myPage—Description

Portfolio

This section is coming soon. Stay tuned!

SohoOS Business Directory

SohoOS provides each business with a page, called *myPage*, on the SohoOS Business Directory. The SohoOS Business Directory is designed to promote business collaboration and increase visibility.

The Business Directory is an excellent resource for finding small businesses, contractors and freelancers. You can browse the Business Directory by clicking the *SohoDir* icon on the bottom right side of your homepage, or you can access it directly at <http://www.sohoos.com/welcome/businessdirectory/>. Enter an industry, country, and state [if in United States] to find the small business you need.



When you created an account with SohoOS, you were asked to fill in your company information. This information is represented on all your business documents (e.g. invoices, sales orders and estimates) as well as on your Business Directory listing (myPage). You can edit the information that appears on your myPage on the *Business Info* and *myPage* tabs under the *My Account* menu.

Your myPage comes equipped with a contact form. Anyone who fills in this form will be added as a lead to your contacts.

Make sure you fill out your myPage completely so people searching the SohoOS Business Directory can learn all about your business.

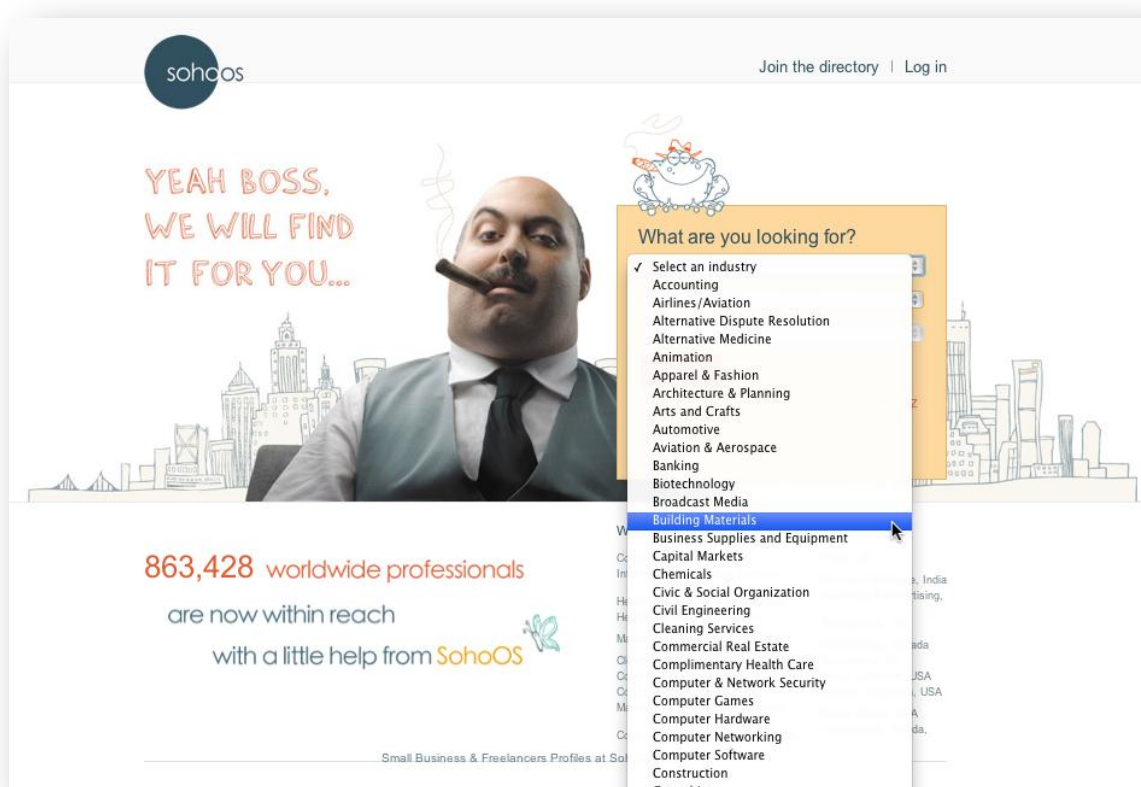




Image 19 – SohoOS Business Directory



Using Your SohoOS Account

After you finish setting up your Business Profile and myPage, click the SohoOS logo on the left side of the top bar go to the *My Business* page. This acts as the hub of your account and allows you to access the vast majority of your business tools. The very first time you see this page, you can view video tutorials by clicking on the  button, which will bring up a window with numerous tutorials that explain the different features of the SohoOS platform. When you are finished watching the tutorials, click the  icon on the top right to close the window.

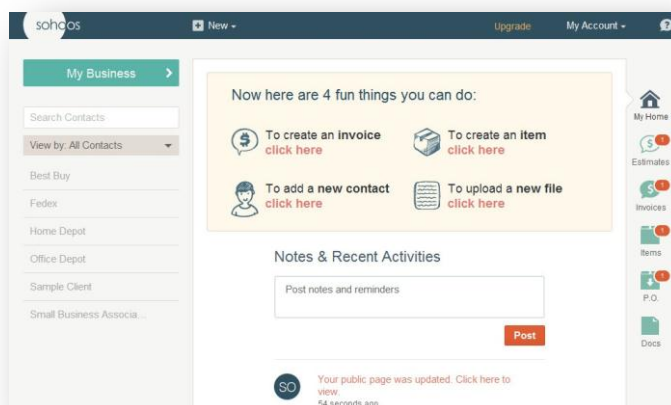


Image 20 – Initial My Business View

By default, your homepage is the *My Business View* mode. As soon as you click the *My Business* bar, located on the left, you will be taken to your homepage, where you can see all the recent activities in your account.

When viewing your account in *My Business View* mode, your contact list is found on the left side of your screen. From there you can search or select contacts, and doing so will allow you to shift between *Selected Contact View* and *My Business View*. *Selected Contact View* is another way of referring to the pages that you see when selecting a specific contact.

My Business View is ideal for users with a high volume of customers. Online businesses with many products won't need to store detailed information about each one of their many customers. However, more service-oriented businesses (e.g. consultants) may want to keep comprehensive records of the personal details and transaction histories of their few intimate clients. These businesses may prefer *Selected Contact View*.

Shifting between these two viewing modes makes it simple for any type of business to get the most out of SohoOS.



Navigating My Business View

Click **My Business** > to see a full overview of your account and all your activities.

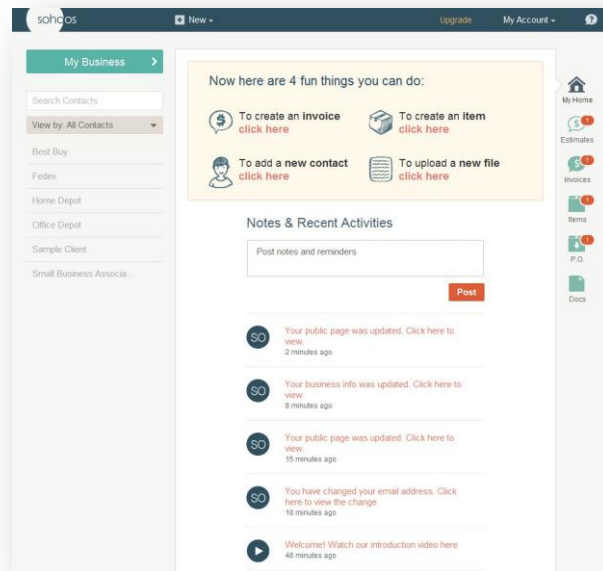


Image 21 – My Business View

Your homepage shows your activity feed. Whenever you create an invoice, add a contact, or make any other action, it will appear under *Notes & Recent Activities*. Use this as an overview of your account and click any item to access it. You can write notes and reminders, and they will appear on your activities feed.

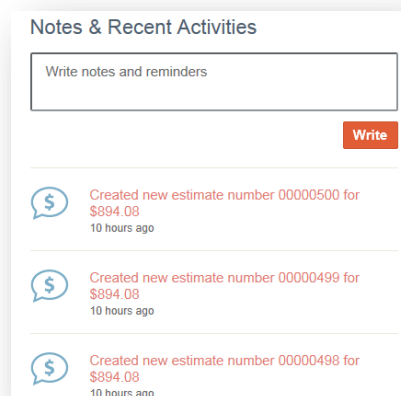
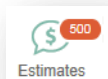


Image 22 – Notes & Recent Activities



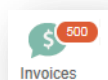
The toolbar on the right of your homepage screen allows you to navigate through your business tools. Click an icon to see all related items. The number attached to each icon indicates the number of related items that have been created in the applicable category.

Estimates



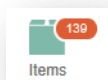
An estimate is a nonbinding document offering basic information regarding a product or service you wish to supply (also called a "sales quote"). For more information on this feature, go to *Estimates* under the *Business Tools* section on page 27.

Invoices



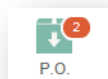
An invoice is a commercial document issued by the seller to the buyer indicating required payment. For more information on this feature, go to *Invoices* under the *Business Tools* section on page 28.

Items



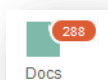
Items are your products and services (also called "Inventory"). For more information on this feature, go to *Items* under the *Business Tools* section on page 30.

P.O. (Purchase Orders)



When you order supplies from a vendor you must first issue a purchase order. Purchase orders are similar to invoices, except you are buying instead of selling. For more information on this feature, go to *Purchase Orders* under the *Business Tools* section on page 30.

Docs



View and edit all your uploaded documents from this tab. All of your documents will be organized on a list that can be sorted by document title or date modified. For more information on this feature, go to *Docs* under the *Business Tools* section on page 31.



Time Tracker



Time Tracker makes it easy to keep track of billable hours. Create timesheets for all of your projects and automatically convert them to invoices. For more information on this feature, see page 29.



SohoDir

Browse the SohoOS Business Directory to find thousands of small businesses in dozens of categories. Just click the *SohoDir* icon to get started.

Navigating Selected Contact View

If you would like to view individual contacts, you can type a contact name into the search box below the *My Business* icon. From the *Selected Contact View*, you can interact directly with different contacts rather than using a broad overview of your account. This is a more detailed and specific approach to handling your business. You can swiftly switch between *My Business View* and back to a contact, depending on your current needs.

After you click a contact's name, you will be taken to the contact details page. The menu on the right shows a selection of options directly related to this contact. The number attached to each icon indicates the number of related items that have been created for this contact in the applicable category.

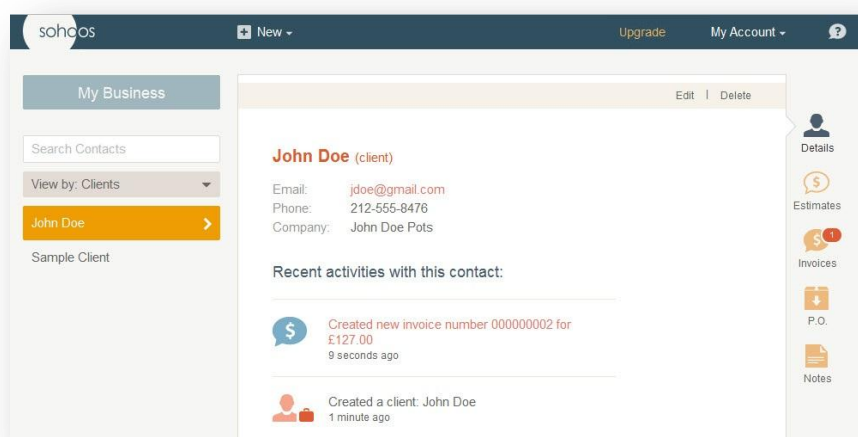


Image 23 – Selected Contact View

Click an icon on the menu on the right to show the full list of activities in the category that are related to the selected client.



Details

This is essentially the profile of your contact, containing the contact information, recent activities feed and other relevant information. All changes made to each contact will show up chronologically under *Recent Activities* along with any item, invoice, etc. related to the contact that you create or update.

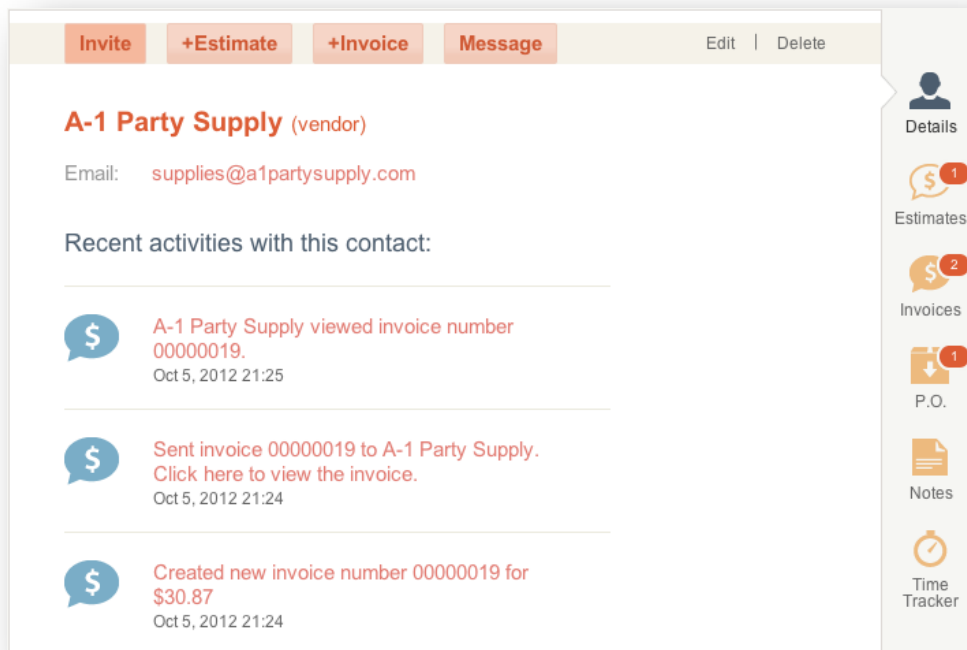


Image 24 – Details page

The red buttons on the top bar give you several actions you can perform. Invite your contact to join SohoOS, click *Invite*. Click *Estimate* to create a new estimate for the contact. Click *Invoice* to create a new invoice for the contact. Click *Message* to send a direct email to the contact. If the *Message* button doesn't appear, click *Edit*, add the contact's email address and click *Save*. Now the *Message* button will be visible.

Click the *Edit* button on the top of the page to change the details of your contact, or click *Delete* to remove the contact.



Notes

While viewing a contact, you can click *Notes* to access a page where you can write records, reminders or history related to this contact. These notes will only be viewable from the specific contact's *Notes* page, and will not be visible to the contact.

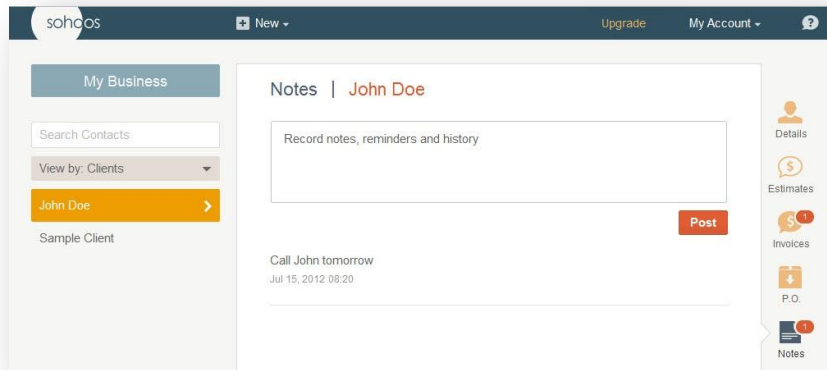


Image 25 – Notes page

Contact Management

Your contacts can be found on the left menu of your homepage. You can either scroll through your entire list of contacts or choose to view by type (Client, Lead, Personal Contact or Vendor) via the *View by:* dropdown menu, which is located below the *Search Contacts* box. You can also start typing a contact's name in the *Search Contacts* box to bring it up immediately. Once you have located the desired contact, click the name to see the contact's details.

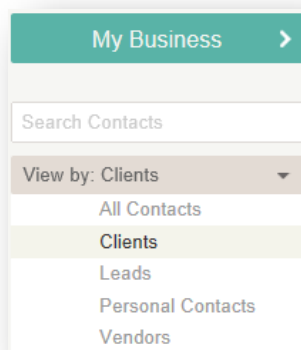



Image 26 – View by menu and search



You can also create a new contact by clicking the  icon on the top bar. You will be asked to choose between a Client, Lead, Personal Contact or Vendor. Choose the applicable option and you will be taken to the contact creation screen. Fill out the details and click *Save* to add the new contact to your list. To invite your new contact to SohoOS, check the *Invite to SohoOS* box. Direct communication within the system is coming soon.

You can also create a new contact from directly within an estimate, invoice, or purchase order.

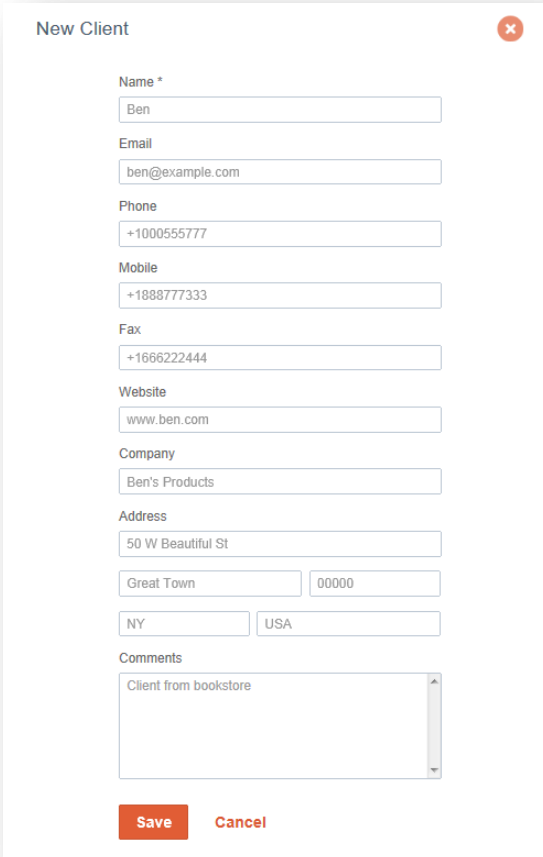

A screenshot of the "New Client" form in the SohoOS application. The form is a white modal window with a red close button in the top right corner. It contains several input fields for client information: Name (filled with "Ben"), Email (filled with "ben@example.com"), Phone (filled with "+1000555777"), Mobile (filled with "+1888777333"), Fax (filled with "+1666222444"), Website (filled with "www.ben.com"), Company (filled with "Ben's Products"), Address (filled with "50 W Beautiful St"), City (filled with "Great Town"), Zip (filled with "00000"), State (filled with "NY"), and Country (filled with "USA"). There is also a "Comments" section with a text area containing "Client from bookstore". At the bottom of the form are two buttons: "Save" (orange) and "Cancel" (red).

Image 27 – Adding a new contact

Clients

Clients are the contacts who purchase products or services from you. If you create an estimate or invoice for someone who isn't on your client list, you will have the option of automatically generating a new client from within your newly created document.



You can create a new client from the  dropdown menu. You can also create a new client while you're creating a new estimate or invoice. Just click in the box under *Contact* and select *+ Add New Contact* from the dropdown menu. In the pop-up window, click *Show more details* to fully fill in all information about the new client. Click *Save*, and you'll be returned to the estimate or invoice you were working on.

Leads

Leads are potential clients you might work with in the future. Leads can be added to your contacts list automatically through the *Contacts* form on your myPage. Once you have done business with a lead, you can edit the contact to convert the status from *lead* to *client*. You can also remove leads using the *Delete* option on the top right.

You can create a new lead from the  dropdown menu.


Personal Contacts

Personal contacts are people whom you know, but do not necessarily do business with.

You can create a new personal contact from the  dropdown menu.

Vendors

Vendors are the contacts whom you purchase items from. If you create a purchase order for someone who isn't on your vendors list, you will have the option of automatically generating a new vendor from the information in your newly created document.

You can create a new vendor from the  dropdown menu. You can also create a new vendor while you're creating a new purchase order. Just click in the box under *Contact* and select *+ Add New Contact* from the dropdown menu. In the pop-up window, click *Show more details* to fully fill in all information about the new vendor. Click *Save*, and you'll be returned to the purchase order you were working on.





The Invoice Cycle

SohoOS makes invoicing a breeze. From getting clients to getting paid, the system tracks the status of all your transactions for you. Just check the news feed on your homepage to see the status of estimates and invoices.

Estimates

An estimate is a document offering basic information regarding the products or services you plan to supply and the costs. Make sure to update your inventory prior to starting work with estimates; it will make the whole process much easier. Start by clicking *Estimates* on the menu on the right side of the window. Clicking while in My Business View will show all your estimates, while clicking the link in Selected Contact View will show estimates specifically for that contact.

To create an estimate, click *Estimates* on the menu on the right side of the page, followed by , or click the  **New** dropdown menu from any screen on the site and then click *Estimate*. Fill in the contact details of the prospective client and the list of items you intend to provide. Tax calculations are based on the tax settings definable under *Settings*. Once you create and save an estimate, you will see action buttons that allow different activities: *Send*, *PDF* and *Create Invoice*.

Click *PDF* to save a PDF version of the estimate.

Click *Send* to email your contact a link to the estimate. Your contact will have the choice to print, download, accept, reject, or make a comment. The newsfeed on your SohoOS homepage will be updated automatically when your contact views, accepts, or rejects and estimate or sends a comment about it.

When your estimate is approved, click *Create Invoice* to automatically convert the estimate into an invoice. When an estimate is turned into an invoice, it does not disappear from the estimates list.

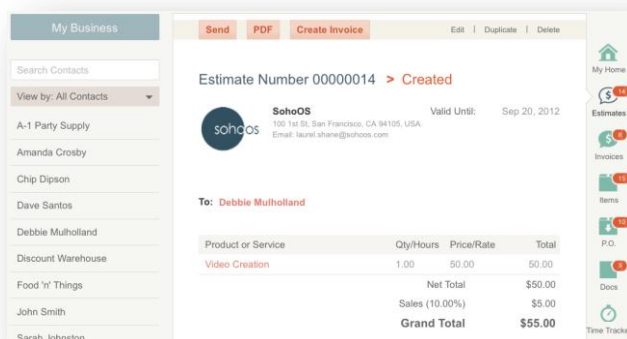




Image 28 – Completed estimate



Invoices

An invoice is the last stage in a client's cycle. Your client already received an initial estimate and approved it, the work was completed, and now it's time for you to get paid. You can generate an invoice directly from an estimate, you can generate an invoice from your Time Tracker entries (see next page), or you can generate an invoice from scratch by clicking *Invoices* on the menu on the right side of the page. Clicking while in *My Business View* will show all your invoices, while clicking in *Selected Contact View* will only show invoices for that specific contact. While you are in the invoice section, you can click the  button to create a new invoice or you can click the  **New** dropdown menu, followed by *Invoices*.

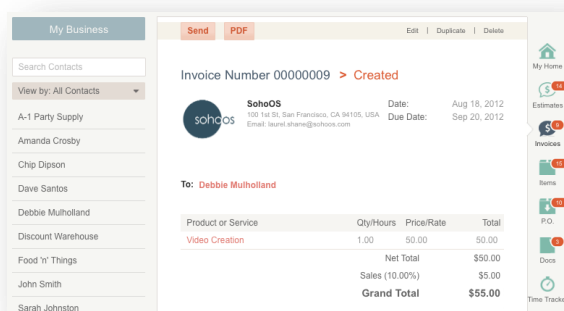


Image 29 – Invoice

If you generated your invoice from an estimate, all of the relevant data will be automatically transferred to your new invoice. If you are starting from scratch, be sure to add the relevant items and choose the applicable contact. Any item that is added to an invoice will be deducted from your inventory. Once you are done inputting the data and saving the invoice, you will see action buttons that allow different activities: *Send* or *PDF*.

Click *PDF* to save a PDF version of the invoice.

The SohoOS platform brings you fully integrated PayPal support. This means you can request payment from your clients using a PayPal interface and the money will be deposited directly into your PayPal account. All transactions are secure and do not incur extra charges other than those charged by PayPal.

Click *Send* to email your contact a link to the invoice. If you want to request a direct payment through PayPal, check the box next to *Get paid online* and enter the email address associated with your PayPal account.

Your contact will have the choice to print, download, pay directly, or make a comment. The newsfeed on your SohoOS homepage will be updated automatically when your contact views the invoice, makes a payment, or leaves a comment.



Invoices from Time Tracker

Need to keep track of billable hours for multiple projects and clients? Time Tracker was made for you. Without having to leave the SohoOS system, you can easily create timesheets for all of your clients, convert them to invoices, and request payment from your clients. Using the intuitive interface, you can link each time entry to the relevant client, choose the service you completed, and record the hours and minutes you spent on the project. It is easy to sort your timesheets, so you can find just the ones you need when you are ready to initiate the billing phase. Time Tracker will save you time and hassle, allowing you to accurately track your projects from within the SohoOS platform.

The Time Tracker icon will appear on the bottom right of your homepage. To make a new timesheet, select a contact and an item/service from the dropdown menus. Enter your billable hours, and click *Log It*.

The screenshot shows the 'Time Tracker' interface. At the top, there are tabs for 'Today', 'Yesterday', '2 Days ago', and 'Calendar'. Below these are dropdown menus for 'Contact/Name*' and 'Item/Service*', followed by a 'Hours*' input field and a 'Log It' button. A red button labeled 'Invoice It' is also visible. Below the input fields, there is a table titled 'Select time-entries to invoice' with columns for 'Date', 'Contact Name', 'Item/Service', 'Hours', and 'Show All'. The table contains five entries, each with a checkbox, a name, a date, a service, and hours. The first entry is checked.

Date	Contact Name	Item/Service	Hours	Show All
<input checked="" type="checkbox"/>	Amanda Little Aug 10, 2012	Accounting	4.5 Hours	Edit x
<input type="checkbox"/>	Sarah Stein Aug 10, 2012	Accounting	0.75 Hours	Edit x
<input type="checkbox"/>	Jimmy McClaren Aug 10, 2012	Consultation	3 Hours	Edit x
<input type="checkbox"/>	Amanda Little Aug 10, 2012	Filing Taxes	2 Hours	Edit x
<input type="checkbox"/>	David Ortiz Aug 10, 2012	Filing Taxes	1 Hours	Edit x

Image 30 – Time Tracker

When you're ready to bill a client, simply check the time entries you want to attach to the invoice and click *Invoice It*.

This screenshot is similar to the previous one, but it shows the 'Invoice It' button being clicked. The first entry in the table is now checked with a blue checkmark. The 'Invoice It' button is highlighted with a mouse cursor.

Date	Contact Name	Item/Service	Hours	Show All
<input checked="" type="checkbox"/>	Amanda Little Aug 10, 2012	Accounting	4.5 Hours	Edit x
<input type="checkbox"/>	Amanda Little Aug 10, 2012	Filing Taxes	2 Hours	Edit x
<input checked="" type="checkbox"/>	Amanda Little Aug 10, 2012	Planning	1.5 Hours	Edit x



Image 31 – Attaching time entries to an invoice



Items

Items are all of your products and services. Essentially, this category covers anything you can attach a price tag to. In this section, you can manage prices, inventory and more. Start by clicking *Items* on the menu on the right side of the page. This option is only available while in *My Business View*.

Image 32 – Adding a new item



To create a new item, click the  icon on the top of the *Items* page, or the  **New** dropdown menu, followed by *Items*. Make sure you fill in all of the relevant information for each item, including assigning a vendor, setting a price, and recording the actual quantity of the items that you have in stock.

You can also add a new item while making an estimate, invoice, or purchase order. Just click in the box under *Product or Service* and select **+ Add New Item** from the dropdown menu. In the pop-up window, click *Show more details* to fully fill in all information about the item. Click **Save**, and you'll be returned to the estimate, invoice, or P.O. you were working on.

P.O. (Purchase Orders)

When you order supplies from a vendor, you must first issue a purchase order, or P.O. Start by clicking *P.O.* on the menu on the right side of the page. Clicking while in *My Business View* will show all of your purchase orders, whereas clicking in *Selected Contact View* will only show purchase orders for that vendor.



Click the  icon from the *P.O.* screen, or click the  **New** dropdown menu and then click *P.O.* Be sure to enter all relevant data. The *Price* field indicates the price you charge clients for the item. The *Cost Price* field indicates the amount you pay to the vendor.

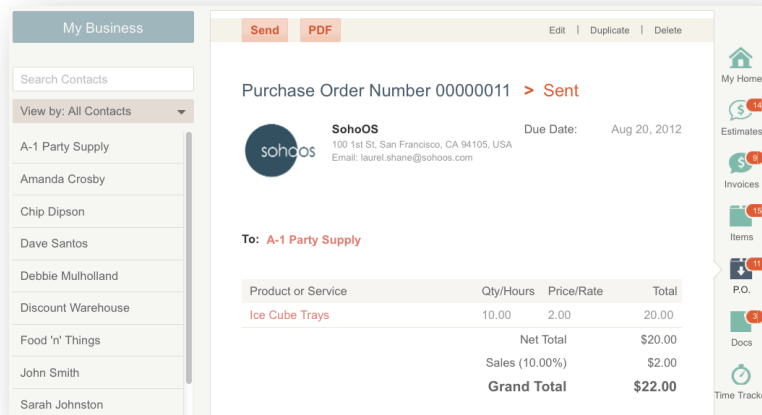




Image 33 – New purchase order

Once the purchase order is created, you can download it in PDF format by clicking *PDF*, or email it directly from within the system by clicking *Send*.

Docs

View and edit all of your uploaded documents from this tab. Click *Docs* on the menu on the right side of the page while in My Business View to see all of your documents, organized in folders. To create a new folder, click *New Folder*. To add a new document to an existing folder, by click the  icon. You can also upload a document from any page by using the  **New** dropdown menu and clicking *Docs*.

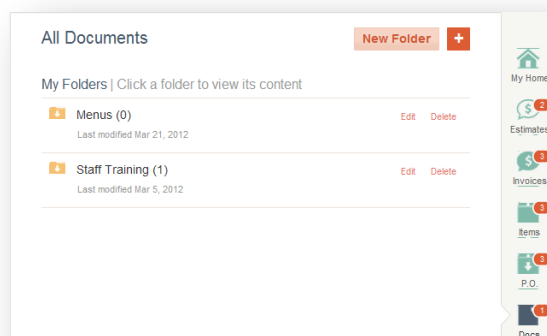


Image 34 – Folders



Click *Browse* to choose a file. Then give your new document a title, choose which folder you want to store it in, and click *Save*. By clicking on the title of the document you uploaded, you will have the option to *Edit*, *Delete*, or *Download* the document. All these commands are located on the top bar.

A screenshot of the 'Upload New Document' dialog box. The dialog has a title bar with a close button (X). Inside, there are four sections: 'Upload Document *' with a text input field and a 'Browse' button; 'Document Title' with a text input field containing 'Morning Menu'; 'To Folder' with a dropdown menu showing 'Menus'; and 'Comments' with a text input field containing 'Morning Menu'. At the bottom are 'Save' and 'Cancel' buttons. To the right of the dialog is a sidebar with icons for 'My Home', 'Estimates' (2), 'Invoices' (3), 'Items' (3), 'P.O.' (3), and 'Docs' (1).

Image 35 – Uploading a document

You get 20 MB of storage space for free when you sign up for SohoOS. If you want more space, you can purchase 2,000 MB of storage, plenty of room to store all of their business documents. See page 39 for more details.



Soho Shop

Introducing the Soho Shop

Enhance your SohoOS experience with these carefully selected premium features that are not available with the basic SohoOS system. Each item is custom-designed to optimize how your business operates and to give you an extra edge.

Click the *Upgrade* button located on the top bar of any screen to access the Soho Shop.

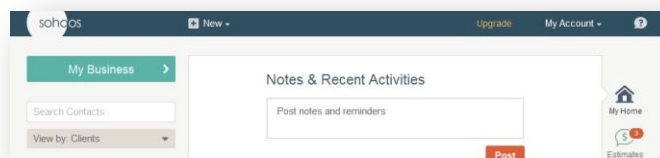


Image 36 – How to access the Soho Shop

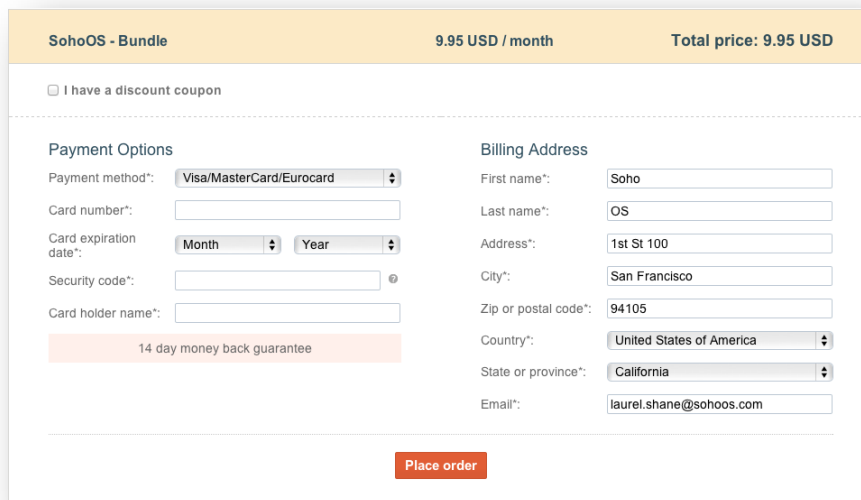
You will be taken to a page where you can read all about the premium features. Click *Learn More* under a specific feature to get an in-depth description. Check the box next to each of the features you want to try and click *Buy Now!* to get started. You can also elect to buy a bundle of all the premium features. Just click the button under the 1-month, 1-quarter, or 1-year option, according to your preference.



Image 37 – The Soho Shop



After you choose the tools or bundle you want, you will be directed to a secure page where you can fill in your billing information.



The image shows a billing page for SohoOS - Bundle. At the top, it displays '9.95 USD / month' and 'Total price: 9.95 USD'. Below this is a checkbox for 'I have a discount coupon'. The form is divided into two main sections: 'Payment Options' and 'Billing Address'. The 'Payment Options' section includes fields for 'Payment method*' (set to Visa/MasterCard/Eurocard), 'Card number*', 'Card expiration date*' (with Month and Year dropdowns), 'Security code*', and 'Card holder name*'. A '14 day money back guarantee' banner is visible below these fields. The 'Billing Address' section includes fields for 'First name*' (Soho), 'Last name*' (OS), 'Address*' (1st St 100), 'City*' (San Francisco), 'Zip or postal code*' (94105), 'Country*' (United States of America), 'State or province*' (California), and 'Email*' (laurel.shane@sohoos.com). A 'Place order' button is located at the bottom right of the form.

Image 38 – Soho Shop billing page

Simply fill in your details and click *Place Order* to confirm your order and gain access to your new business tools.

Soho Shop Features

You can access your new features any time. Just go to *My Account* and click *Settings*. Your features will be under *Purchased Items* on the left menu.

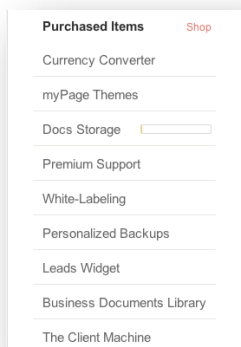


Image 39 – Purchased Items



Super-Sized Storage



The Docs feature (lower right-hand corner of the SohoOS web application) is much more useful and powerful: 2GB of total storage, unlimited files, and 100 folders (instead of just 20MB and 5 folders in the regular account). Now you can really keep all your business documents in one place.

In order to access your stored documents, go to your homepage, click *Docs*, select the document you want and click *Download* to begin downloading the document to your computer.

This feature will be automatically activated upon purchase.

White-Labeling



The SohoOS logo will be removed from all documents and emails sent from SohoOS to your customers. This will affect even documents created in the past. For instance, if you click *Send* on an invoice you created before you purchase the White-Labeling (even one that you had previously sent), that invoice will now be sent without the SohoOS logo.

This feature will be automatically activated upon purchase.

Leads Widget: Get More Customers for Your Business



Drive new leads directly into your SohoOS account from anywhere on the Web. Open the Leads Widget, choose a theme, copy the code, and embed it into your website, blog, fan page, etc. An email notification is automatically sent to you and the new lead will show up in your SohoOS contact list.



The Leads Widget is, in essence, a portable contact form. To start using it, simply click *Leads Widget* to open an easy-to-use wizard that generates the required code.

Image 40 – Grabbing the Leads Widget from SohoOS

Choose a theme for your contact form by clicking the desired background color. A piece of code will appear in the text box on the right. Simply copy the code (highlight it with your mouse and click *Copy*), go to your website or blog editor, choose the desired location and click *Paste*. Save it and you're done!

Contact details entered into the widget will be automatically added to the *Leads* section of your *Contacts* feature.

Currency Converter



Tired of using conversion calculators? Hate having to re-check the euro-to-dollar conversion rate every time you do a transaction? Your vendor is from Ecuador but your clients are from Sweden? Not sure if Poland still uses the zloty?

We have a simple and comprehensive solution for you: the Currency Converter.

Simply select any currency for any invoice, estimate, or P.O., and your items' prices are automatically converted without your worrying about it. It's easy to use and simple to understand.

The Currency Converter updates automatically every hour using Google Finance. No matter where in the world you do business, you'll always be effortlessly up-to-date on conversion rates.



myPage Themes



Spice up your myPage by adding one of our myPage Themes! You can gain access to this feature by buying a bundle or by buying the myPage Themes tool separately. In order to purchase this feature, click *Upgrade* to enter our Soho Shop, select *myPage Themes*, and then choose *Buy now!*

By default, Google AdSense ads are displayed on all Business Directory listings. When you purchase myPage themes, the ads will be automatically removed from your myPage.

Once you have purchased this feature, you can click *My Account* and then *Settings*. In the Settings menu, you can choose and preview myPage Themes.

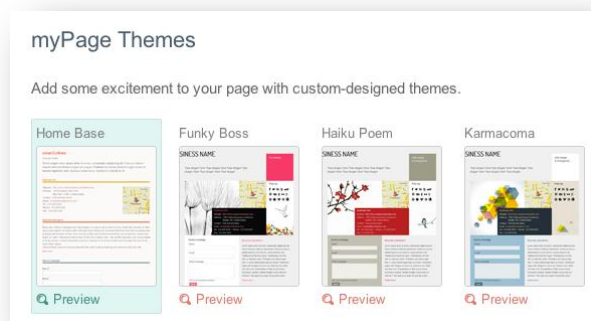


Image 41 – myPage Themes

Premium Support



Just click *Contact Now*, fill in your telephone number, and an experienced SohoOS support representative will call you (maximum one hour but typically within minutes).

Image 42 – Requesting a phone call

Enter your number, click *Call Me!* and we will call you within one hour. ***Please don't forget to insert all international prefixes***—for example: + 1-212-555-5555



Personalized Backups



Each week you get your entire history of aggregated data emailed to you. These data backups are in CSV format, which can be opened in any spreadsheet (e.g. Microsoft Excel or Google Spreadsheets). Use these backups to further analyze your business, pass them on to your bookkeeper/accountant, or keep them as an extra layer of security to recover information you may have mistakenly deleted.

You can turn the email feature off and back on at any time.

* SohoOS backs up all our users' data internally to ensure their data is always safe, of course.

Click *Backup Settings* under *Personalized Backups* to access this feature. Once you do so, the following message will appear:

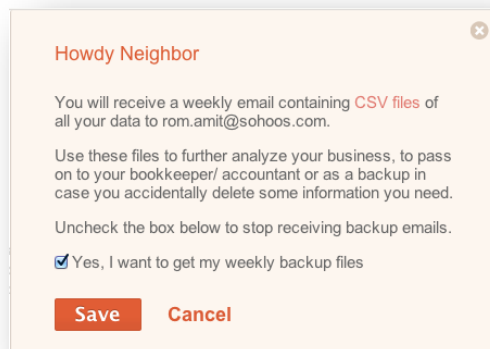


Image 43 – Backup

If you do not wish to receive the weekly backup, uncheck the box and click **Save**.

Business Document Library



The ultimate business library at your fingertips: Just click *Browse Library* to preview and download all the business agreements, Excel templates, business letters, financial templates and additional documents that your business will ever need. Easily browse and search over 1,000 templates in dozens of categories and get just what you need, right when you need it.



To access the feature, click *Business Documents* on the *Settings* page. You can either type the name of the document you are seeking into the search box or choose a related category. To see a preview of the document you requested, click *Preview*. To download the document, click *Download*. You can download as many documents and templates as you want.

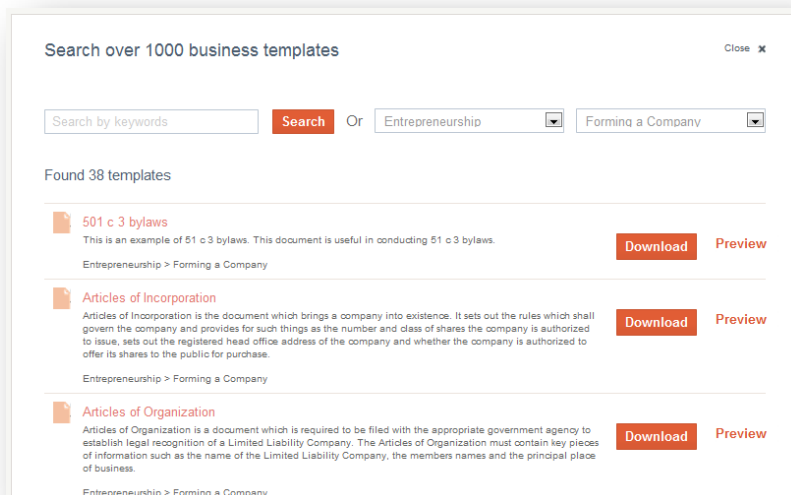


Image 44 – Business Document Library

The Client Machine




Let the leads chase you, rather than you chasing the leads! Our Client Machine scours the Internet to find real leads that are interested in the products or services you provide.

This feature is coming soon.



SohoOS Support



Clicking the  tab will redirect you to the SohoOS support portal (<http://support.sohoos.com>). You can browse through our knowledge base of the most frequently asked questions, watch our video tutorials and more. SohoOS is here for you 24/7!

Live Support


Live Support

Click the **Live Support** button to have a live chat conversation with one of our customer support representatives. We will guide you through and answer your questions in real time.

Video Tutorials

Want to learn more? Watch our video tutorials.



Are you a visual learner? For more information, be sure to watch our helpful video tutorials by clicking the  icon.

Webinars



Webinar

Are you new to SohoOS? Join our monthly webinar sessions. Watch for an invitation in your email; we'll let you know when the next one is coming up. You can watch videos of past webinars by clicking the links on the left side of the support page.



Walkthrough

Walkthrough

On the bottom right side of the screen when you log in, there is a fantastic feature called Walkthrough. It provides you with a step-by-step guide to using the website, including information on how to:

1. Upload logo and information
2. Create a new invoice
3. Publish a business mini-site
4. Set default currency
5. Set tax calculations
6. Request payment w/ PayPal
7. Create a new client
8. Create a new PO
9. Create a new estimate
10. Upgrade to PRO
11. Manage client history
12. Convert leads
13. Import contacts

Please email your questions, requests, or suggestions to support@sohoos.com and we will reply as soon as possible.



SohoOS

Get It Done